

WELCOME

OVERVIEW

As more and more people move into the Charlotte area, traffic congestion and air pollution are steadily increasing. People are continuously exploring ways to reduce the cost of commuting and limit the persistent wear and tear on their vehicles that results from frequent stop-and-go traffic. Surveys indicate that more than 70% of employees look to their employer for information about commute options. The Charlotte Area Transit System has a solution to these challenges. The Employee Transportation Coordinator (ETC) program is a valuable resource for organizations, which helps employers offer commuting alternatives and cost-saving options to employees for daily commuting. Organizations that engage in such activities see benefits which include greater access to employees, improved employee retention, and more. It is easy to get started, and CATS is here to guide you all the way.

Participate in the ETC program by making a commitment to engage in one or more of the following activities:

- Selling transit passes to employees
- Displaying transit schedules in a CATS rack
- Offering the Commuter Tax Benefit
- Offering preferred parking to carpoolers and vanpoolers
- Employing members of a CATS vanpool
- Holding at least one transportation fair onsite annually
- Offering telecommuting/compressed work schedules

MEMBERSHIP BENEFITS

The ETC program benefits businesses, employees, residents and the environment.

Participating organizations can enjoy the following:

- Cost-saving benefits to employees
- Increased parking space capacity
- Reduced payroll taxes with the Tax Commuter Benefit
- Access to custom marketing materials
- Recognition as a Best Workplace for Commuters

Employees of organizations participating in the ETC program receive many benefits including the following:

- Discounts on transit passes ranging from 10% to 20% off regular prices
- Pre-tax deduction on transit passes and vanpool fares
- Reduced commuting costs
- Reduced stress levels

DEVELOPING THE PROGRAM

The designated coordinator at your organization should take on a leadership role in developing, implementing and maintaining a commute management program, which incorporates the ETC activity or activities that your organization has committed to participating in.

STEP ONE. Research

Your company has unique transportation needs, attitudes, corporate culture and beliefs. Take some time to determine the needs and attitudes of employees. You will be concentrating on three primary areas:

- Management
- Worksite
- Employees

An assessment of these three areas will help you set an accurate baseline from which to measure future progress.

Management

Meet with members of your management team and determine the priorities, goals and resources for the ETC program at your organization. The most important factor in developing your commute management program is getting management support. It is critical that your plan is supported by your company's management team. Without their endorsement, the program simply can't succeed. As the coordinator, you must be in a position to speak and act with management as you develop the program.

Worksite

Survey the physical characteristics of your worksite and the surrounding environment. Also consider the following:

- Proximity to CATS stops and LYNX stations
- Access to uptown shuttles, like the Gold Rush
- Location of pedestrian walkways and entrances
- How your company manages employee parking, carpool and vanpool parking
- Bicycle access and facilities
- Parking availability. Number of spaces on- and off-site, preferential spaces, costs per space for the employer/employee, etc.
- Worksite amenities like on-site cafeterias or concierge services

Employees

Before you can develop targeted marketing efforts, you need to determine how the employees in your company feel about transit use and ridesharing. One way to gather this information is to administer an employee survey. A sample survey can be found on the ETC Resources CD. To increase your response rate, send the survey out with a letter from the president, CEO, or Executive Champion of your company. A sample letter is also available in the ETC Resources CD to be used as a guide.

STEP TWO. Analyze

Once you have received adequate input and feedback from employees, identify common needs and interests within your organization regarding transit use and ridesharing. All information has been collected and is accessible; the resulting data needs to be processed and analyzed in order to design an appropriate plan. Contact your CATS ETC Marketing Representative to assist in compiling the survey data.

STEP THREE. Select Program Elements

Based on the results from the surveys, alternate forms of transportation, incentives and other program strategies can be developed and offered in various combinations.

Contact a CATS Marketing Representative to assist you with determining the ETC activities that best meet the needs of your organization.

STEP FOUR. Choose a format

If your organization is large and has several locations, it may be best to begin with a pilot program involving only one location as an initial participant of the program. By doing so, you can perfect the ETC program offerings before introducing them to your entire organization. If your organization is small, implementing a companywide program is probably your most effective course of action.

STEP FIVE. Put it in writing

Your written materials should include the following:

- Overview of the total program
- Survey results (if applicable)
- Program goals and objectives for developing, marketing and maintaining the program activities
- List of assigned and prioritized tasks
- Deadlines for completing these tasks
- Benchmark dates for progress evaluating

STEP SIX. Get approval

Your process is not complete until you have the approval of management. Be sure to emphasize your effective use of company resources in achieving the desired results. Your plan will need to comply with the parameters previously established by management.

GETTING STARTED

All ETC members are responsible for taking an active role in encouraging employees to explore transportation alternatives by implementing a commute management plan and participating in one or more of ETC activities.

STEP ONE: Designate an Employee Transportation Coordinator (ETC)

Designate a person within your company or organization who will act as a liaison between their employees and CATS Marketing. The key activities of an ETC include:

- Implementing and managing ETC activities
- Ensuring that required forms are completed
- Informing your organization about commute options

STEP TWO: Commit to one or more ETC activities

Once the coordinator has been selected, your organization needs to commit to one or more of the activities associated with this program.

- Selling passes onsite
- Displaying transit schedules in a CATS rack
- Offering the Tax Commuter Benefit
- Offering preferred parking to carpoolers and vanpoolers
- Employing members of a CATS vanpool
- Holding at least one transportation fair onsite annually
- Offering telecommuting or compressed work schedules

Selling transit passes to employees

Passes available. ETC members may determine the best method of selling passes at their organization and may sell any of the following passes to employees:

Effective July 1, 2014

Type of pass	Current price	Price with 10% ETC discount	Price with 20% ETC discount
Weekly	\$22.00	\$19.80	\$17.60
Local Monthly	\$88.00	\$79.20	\$70.40
Express Monthly	\$121.00	\$108.90	\$96.80
Express Plus Monthly	\$176.00	\$158.40	\$140.80
STS Monthly	\$140.00	\$126.00	\$112.40
10-Ride Local	\$22.00	\$18.70*	\$17.60
10-Ride Express	\$30.00	\$25.75*	\$24.00
10-Ride Express Plus	\$44.00	\$37.40*	\$35.20
**Senior/ADA Local Monthly	\$44.00		
**Senior/ADA Express Monthly	\$60.50		
**Senior/ADA Express Plus Monthly	\$88.00		

**10-ride passes are discounted 15% to the general public. ETCs qualifying for the 10% discount will receive 10-ride passes at the 15% discount until they achieve the next discount level.)*

***The Senior/ADA monthly passes provide unlimited rides on both CATS and LYNX, and are only available for the following individuals:*

- Disabled citizens*
- Senior Citizens 62 years of age or older*

The Senior/ADA monthly passes are already discounted for the general public and cannot be combined with any other ETC discounts.

A valid Transit identification or Medicare Card must be presented with the Senior/ADA pass upon using CATS or LYNX services. If you don't have a Medicare Card and are 62 years of age or older, you may apply for a transit photo Identification card by presenting proof of age and identity.

Documents acceptable as proof of age include:

- Drivers license
- Birth certificate
- Passport

Documents acceptable as proof of identity include:

- Employment ID with photo
- Drivers license
- Passport
- Government issued photo ID
- Union card with photo

In order to obtain a Transit identification card, Senior and disabled citizens need to visit the Pass Sales & Information Center located in Pavilion A of the Charlotte Transportation Center at 310 East Trade Street, Charlotte, NC 28202. The Pass Sales & Information Center is open Monday – Friday, from 8:00 AM until 5:00 PM. The Transit identification card costs \$1.00 and seniors must present proof of age and identity. Those individuals requesting a disabled transit identification card must also have their physician complete a certificate of disability form. A certificate of disability form may be picked up at the CATS Pass Sales & Information Center.

Please note that all the discounts must be passed on to your employees by offering the passes at the discounted price. Organizations are not allowed to charge more than the discounted price, and the transit passes are to be sold only to company employees. The discount is based on the dollar volume of transit passes sold at your organization during a single month and applies to any combination of passes purchased.

Discounted transit passes are a great benefit to offer employees. However, selling passes is an activity that does require some planning. Listed below are five steps to help your organization successfully establish a transit pass sales procedure.

- **Step One: Determine who will handle all pass sales transactions.**
The coordinator will communicate information to employees about the program, sell the passes, and keep track of the quantity of each type of pass that is sold.
- **Step Two: Determine which passes you would like to sell to employees.** Discuss with CATS which passes meet your employees' needs. Passes come in many values, including weekly and monthly.

- **Step Three: Decide what forms of payment you will accept.**

Does your organization wish to accept cash, check or offer payroll deduction for the transit passes? It is important to determine the methods of payment that will be accepted, so that employees know what to expect prior to purchasing the passes.

- **Step Four: Decide when you will sell the passes.** Many organizations pick specific weekdays and times to sell the passes, while other organizations allow employees to purchase the passes on a much more flexible schedule. Determining when passes will be sold will help the designated coordinator manage this activity and helps employees know what to expect.

- **Step Five: Inform employees of this great benefit.** Once all of the parameters have been established for selling passes at your organization, make sure that everyone knows about this service. Feature this great information in a newsletter and in a new hire information packet. Or send an e-mail blast, put up a poster, and include the news in a staff meeting. Make sure that employees know the following:

- o The types of transit passes that will be sold
- o How much the passes will cost
- o When employees can purchase the passes
- o The location of the on-site pass sales area and who will be the sales contact for your business

Open an account with CATS

1. Once your organization has decided on a pass sales procedure, a credit application must be completed by the appropriate party and mailed to CATS.
2. Upon receipt of your application, CATS will forward the application to the City of Charlotte's Revenue and Finance Department for review.
3. Once approved, CATS will open an account for your organization which will allow you to conduct regular transactions as an ETC member.
4. You will receive written notification of your account status from the CATS Pass Sales and Information Supervisor.

Placing your pass order

When you are ready to order your transit passes, please follow these guidelines:

1. Determine the quantity and types of passes you would like to offer
2. Provide that information to the CATS Pass Sales and Information Supervisor. A consignment form is provide on the ETC Resources CD
3. Fax this form to 704-336-7660 at least 48 hours in advance
4. Contact the CATS Pass Sales and Information Center at 704-336-3519 if you have any questions or concerns about your order

Pass delivery and consignment

1. Once the order has been placed for your organization, you will be contacted by a member of the CATS Pass Sales and Information Center staff.
2. A pickup or delivery date will be scheduled, and you will receive information about the consignment sales process.
3. Every month your order will be delivered, or a member of your organization will be required to pick up passes from the Charlotte Transportation Center Pass Sales Office, located at 310 E. Trade Street in Uptown Charlotte.

Display transit schedules

Tabletop or full display racks may be ordered from the CATS Marketing and Communications Division, and schedules will be provided by our Customer Service department on a regular basis. Contact your CATS ETC Marketing Representative at **etcinterest@ci.charlotte.nc.us** to order a CATS rack and to arrange for regularly scheduled replenishment of transit schedules and other printed materials.

Offer the Commuter Tax Benefit to employees

The Transit Commuter Benefit is the result of a federal law passed under the Taxpayer Relief Act of 1997 and the Transportation Equity Act for the 21st century. This benefit allows employees to purchase transit passes, vanpool and parking vouchers with pre-tax dollars.

Step One:

Find out if your company is eligible. Private employers, non-profit organizations, and public agencies can provide transit commuter benefits to employees, tax-free. Federal government employees and members of the military services are also eligible to receive the transit benefit under SAFETEA-LU. Self-employed individuals, partners, 2-percent shareholders of corporations, sole proprietors, and other independent contractors are not eligible under IRS rules.

Step Two:

When passes, vouchers or similar fare are available, employers need only keep a record of the purchase of the media. In other cases the employer must maintain records that reasonably demonstrate that any cash it pays to employees is being used to cover their actual transit or vanpool commuting costs. Employers may offer different transportation fringe benefits to their employees. Nondiscrimination rules do not apply to these benefits.

Step Three:

The Transit Commuter Benefit program can be utilized in one of three ways. Option One: Beginning in 2014, employers can contribute as much as \$130 per month for each employee as a transportation benefit, and qualify for certain tax savings. Option Two: Employees may have up to \$130 pre-tax deducted per month from their paychecks for transportation costs, which reduces individual taxable income. Option Three: Employers and employees can split the responsibility, and use a combination of the first two options to cover up to \$130 per month for transportation costs, and receive tax savings. The benefit can be applied to transit passes and vanpool commuting costs.

To find out more about this benefit, visit **www.apta.com** or visit www.irs.gov and access Publication 15-B, "Employer's Tax Guide to Fringe Benefits."

Offer preferred parking for carpoolers and vanpoolers

One type of parking management strategy is to offer preferential parking for employees who participate in a CATS vanpool or a carpool. Designating convenient parking for carpoolers and vanpoolers is an ETC activity that not only provides assistance to the employees that participate in these ridesharing activities, but also provides encouragement to other employees to explore transportation alternatives.

As an ETC, you will need to assess the unique elements of your worksite. Organizations with limited parking or inconvenient parking will find more success with parking management incentives than an organization with ample parking spaces located close to the worksite.

Meet with your building manager to discuss the feasibility of designating spaces specifically for carpoolers and vanpoolers. If it is possible to offer preferred parking, estimate the demand for the spaces, and select a realistic number of spaces. Also, check with your building manager or maintenance staff for information on re-striping or adding signage.

Employ members of a CATS vanpool

CATS leases vans that are owned by the City of Charlotte to qualifying individual vanpool drivers or corporate firms. Individuals wishing to join an existing vanpool with open seats can contact the individual vanpool drivers, their ETC or CATS. Go to www.ridetransit.org to see a list of existing vanpools to join.

To start your own vanpool:

- Identify prospective candidates by sending an office-wide e-mail to gauge interest.
- Contact prospective candidates and offer assistance.
- Arrange opportunity for candidates to meet.
- During the meeting, review benefits of vanpooling, describe available incentives and determine feasibility.
- Close the meeting with an agreement to vanpool on a trial basis. If forming a new vanpool, have one person agree to be the vanpool driver.
- CATS will be happy to assist you in setting up your vanpools, as well as maintaining them.

Hold at least one transportation fair onsite annually

Transportation fairs are events that give the employees of your organization an opportunity to interact with members of the CATS Marketing team and receive information about the various commute options available to them. Usually CATS Marketing staff will set up a table in a high-traffic area of your building and provide transit schedules, flyers, brochures and promotional items. Employees can ask questions about their individual commutes and the ETC program elements at their organization.

Offer Telecommuting, Flex-Time, or Compressed Work Schedules

Telecommuting is a synonym for the use of telecommunication to work outside the traditional office or workplace, usually at home or in a mobile situation. Telecommuting has been growing at 15% a year since 1990 in North America and can be beneficial for both the workers and their employers. Compressed work schedules allow employees to work fewer but longer days, such as four 10-hour days each week (4/40), or 9-hour days with one day off every two weeks (9/80).

Compressed work schedules, like telecommuting, are beneficial in reducing commuter trips and are common at many organizations, so an official policy may already exist at your organization.

Remember these key steps when implementing these programs:

Planning

- Designate a coordinator
- Establish program goals
- Provide funding to meet the needs of the program
- Establish a pilot program

Policy

- Establish an company policy
- Establish eligibility criteria to ensure that participating employees are selected on an equitable basis using criteria such as suitability of tasks and employee performance
- Establish policies or requirements to facilitate communication among teleworkers, managers, and coworkers
- Develop an agreement for use between employees and their managers

Performance management

- Ensure that the same performance standards are used to evaluate both teleworkers and non-teleworkers
- Establish guidelines to minimize adverse impact on non-teleworkers before employees begin to work at alternate work sites

Managerial support

- Obtain support from top management for the program

Training

- Train all employees involved in the program

Technology

- Conduct an assessment of technology needs
- Develop technology guidelines about equipment and supplies for teleworking
- Provide technical support for employees
- Address access and security issues related to telework
- Establish standards for equipment used in the telework program

Evaluation

- Track participation
- Collect data to evaluate your program
- Identify problems and/or issues with the program and make appropriate adjustments

IMPLEMENTING THE PROGRAM

Once you have designated your ETC program coordinator, committed to at least one ETC program activity, and created your commute management plan, you should be ready to implement the program at your organization.

STEP ONE. Establish procedures

Your ETC activities will dictate whether or not you will need to establish any procedures. For example, if your organization only plans to display transit information in the lobby of your building, then this step does not really apply to you. However if you are going to sell passes or offer preferred parking to vanpoolers and carpoolers, then you need to have an established procedure in place to handle those activities.

STEP TWO. Communicate with employees

Use the marketing or promotional section of your commute management plan to decide how you want to inform employees about the ETC program. Once you have determined how you will get the word out in your organization, it's important to communicate regularly.

STEP THREE. Begin your activity or activities

Now it's time to begin this wonderful program that you have worked so hard to create. For additional resources, please review the CD enclosed in this guide.

STEP FOUR. Monitor the Plan

Regularly monitor your plan and make adjustments accordingly to ensure that the commuting needs of your organization are being met.

STEP FIVE. Promote the Plan

One of the key components of any successful commute management program lies in the marketing and promotion of the program. Without proper marketing, employees will not know what the program is about, how they can participate, or the benefits they can receive. A wonderfully designed program can fail miserably if you don't get the word out.

Provide Continuous Information:

Work with CATS Marketing to ensure that your employees are informed and engaged. We can assist you with creating the following:

- **Newsletters/Flyers.** Both are easy, cost-effective methods for communicating information to employees.
- **Brochures.** A good basic marketing tool, brochures provide a lot of information in a concise format. To better assist you with communicating to employees, we have included brochures in this kit, and we can provide additional brochures upon your request.
- **E-mail blasts.** Send important information about the program in a well-designed e-mail.
- **Posters.** CATS has provided a poster design in this kit – make copies of it and place in areas where it will be seen. Our marketing team can also provide you with customized posters to meet the unique needs of your organization.
- **New Employee Orientation.** Align yourself with your human resources director and make sure the ETC program is an integral part of the employee orientation process. Transit alternatives, options and benefits should be clearly communicated to every new employee. Either set up meetings with new employees where you can explain transit options and encourage alternative commuting, or request that HR personnel actively communicate this information to new employees.
- **Transportation Information Center.** Create a transportation information center complete with bus and rail schedules, maps, and transit pass information and place in a high-traffic area in your building.
- **Incentive Programs.** Offer fun and creative incentives such as contests, raffles, and prizes that reward employees for supporting the program and using alternative forms of transportation.

Develop special promotions and events:

To create excitement for the ETC Program, you need to develop an event that will interest everyone in the company. The event should not only generate attention, but also serve to educate employees about the program and encourage trial ridership. The following is a list of elements that can make your promotion a success:

- Make it a catered event centered around breakfast or lunch
- Provide interactive games to engage employees and create a fun atmosphere
- Secure great guest speakers to communicate relevant information and help promote the program
- Raffle prizes off to employees who attend, and shower them with promotional give-away items
- Partner with local and popular merchants to make the event a success

PROGRAM INCENTIVES

Become one of Charlotte-Mecklenburg's Best Workplaces for Commuters.

Best Workplaces for Commuters is an innovative program that provides national recognition to businesses and organizations that meet the national standard of excellence for commuter benefits. Best Workplaces for Commuters is designed to assist employers in their efforts to reduce vehicle miles (VMT) and nitrogen oxides (NOx) by reducing the number of employees driving alone.

To qualify, organizations must provide:

- One of the following primary benefits:
 - o A monthly transit pass or vanpool subsidy of at least \$30
 - o At least 30% of employees participating in a pre-tax purchase of a monthly transit pass or vanpool fare of at least \$30 a month
 - o Parking cash-out (where employees trade free parking for cash) of at least \$30 per month
 - o A significant telecommuting program or compressed work week program that reduces 6% of commute trips
 - o Access to an Emergency Ride Home Program
- Offer at least three supporting benefits. A few of the many examples include:
 - o Preferred parking for carpoolers
 - o On-site amenities or concierge services
 - o Lockers and showers for bikers
 - o Ridesharing services
 - o Membership in a transportation management association
 - o Participation in a regional air quality or local ozone awareness program
- And also must offer each of the following:
 - o Employees have access to an emergency guaranteed ride home
 - o Have a designated point of contact in charge of commuter benefits, and keep commuter benefit information in a central location
 - o Actively promote commuter benefits to employees
 - o At least 14% of employees are not driving alone to work

Once your application is approved, organizations may be charged membership dues. For more details, visit www.bestworkplaces.org. If your organization would like to be a Best Workplace for Commuters, contact your CATS ETC Marketing Representative.

RESOURCES

At the Charlotte Area Transit System, we are here to make your job as an ETC as successful and easy as possible. During this process, our Marketing and Communications Division will be providing ongoing assistance, communication, education and support.

The following is a list of services and resources that will be available to you.

Consulting. Whenever you have questions or concerns about any aspect of the ETC program, please feel free to call us or schedule a meeting. We will be glad to provide an assessment of your employee's commuting needs, offer solutions and conduct events on-site to educate management and employees.

Posters. Poster designs are included on the ETC Resources CD.

Sample Survey. Save time by using the survey we have already developed and provided on the ETC Resources CD.

Sample Letters. Increase the response from your employee surveys by using our sample CEO/President letter as a tool to create your own. The letter can be found on the ETC Resources CD.

Bus and Train Schedules/Routes/Maps. We will provide plenty of copies to get all your employees headed in the right direction.

How to Ride Brochure. Learn more about how to use all of CATS services.

CONTACT INFO

By Phone

704-336-RIDE (7433) or 866-779-CATS (2287) – CATS, LYNX and Rideshare Information

- * *Speak with a Transit Customer Service Representative*
Monday through Friday from 6:00 a.m. to 10:00 p.m.
Saturday and Sunday from 7:00 a.m. to 4:00 p.m.
- * *Our interactive information expert, 7 days a week, 24 hours a day.*

704-336-7902 - CATS Administrative Offices

704-336-5051 - CATS TDD

704-336-3159 - Charlotte Transportation Center (CTC)

704-336-2637 - Special Transportation For People With Disabilities

By Internet – www.ridetransit.org

Feel free to e-mail us. You can expect a reply within 48 hours.

For Carpool/Vanpool Matching:

sharetheridenc.com

For ETC information:

ETCInterest@ci.charlotte.nc.us

For Transit information:

TellTransit@ci.charlotte.nc.us

For Vanpool information:

VanPools@ci.charlotte.nc.us